

VERSION 1.0
NOVEMBER 23, 2017

Apps for Greentree

INVENTORY PRICING WORKBENCH

APP NUMBER: 010012

Powered by:

MYOB Greentree



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FEATURES

1. Inventory Pricing Workbench

Set and modify Standard Prices and Advanced Prices in bulk in Greentree using the Inventory Pricing Workbench App.

The App displays prices in a Workbench screen where new prices can be auto-calculated based on user-defined formulae and then individually modified, before being processed to the live Greentree system immediately or saved and updated later. Examples include:

- add 5% to the current Trade price for all stock items
- Set special pricing on a single category of products by marking them down by 25% from RRP
- Display all stock items with a current Margin less than 10% and update them to 20%

Detailed Features

- Work with Standard Price Books or Advanced Pricing
- Select Prices to work with based on a combination of:
 - Price Book
 - Stock Codes and Stock Trees
 - Analysis Codes
 - A Supplier
 - Customers and Customer Trees
 - Sales Reps o current Margin being Greater Than or Less Than a value or percentage, or within a range
 - Items whose last cost was updated after a specified date
- Calculate global price changes on the selected Prices, based on:
 - o Percentage change from current prices
 - o Mark-up or mark-down percentage based on a range of cost and price-book options
- Display and select based on Margin or Markup per Inventory Module control
- Preview the Proposed Price, GP and Percentage Change for each Stock Item • Show a price comparison to another Price Book
- Modify individual Prices manually
- Save Proposed changes and return later to edit or apply
- Update live Greentree pricing when you're happy with the changes
- Review the Pricing History for all Prices set or changed using the Inventory Pricing Workbench

IMPORTANT NOTES

- The Inventory Pricing Workbench does not support pricing of Quantity Breaks separately. It will preserve but not necessarily change existing quantity break pricing. You should test all Pricing updates for products that have Quantity Breaks before applying the changes in a live system.

OTHER REQUIREMENTS

Greentree Modules: Inventory

Associated Apps: None

USER INSTRUCTIONS

INSTRUCTIONS

Creating a Price Update and Selecting Records

The App works by creating a Price Update record, containing a selection of prices. Each Price Update record is named uniquely and may be saved and recalled. Simply creating a Price Update does not commit the price changes to the Live Greentree system, so Price Updates can be created for reviewing existing pricing or in preparation for a change some time in the future.

1. Select the menu item | [Process](#) | [Inventory](#) | [Inventory Pricing Workbench](#) |

2. Complete the header fields

Reference

Enter a name for this price update, allowing the data to be saved and recalled

Note: You can have multiple price updates under way at any time and may want to refer back to a price update in future, so this name should be meaningful

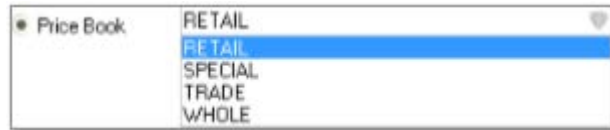
Status

This field is set automatically by the App

Entered This field is set automatically by the App

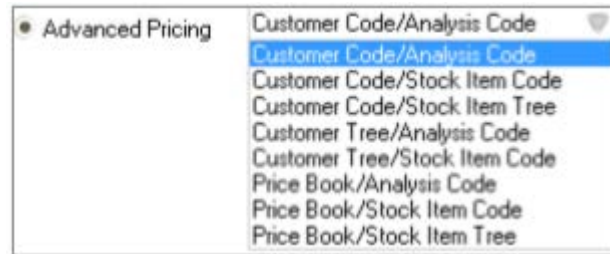
Proposed Effective Date Select the date you expect the changes to take effect.
Note: This is a memo only and does not schedule the changes to take effect automatically

Price Book to Update Click the radio button if this price update is for a standard Price Book and choose it from the drop-down



Price Book to Compare If you want to see the prices from another price for comparison, choose it from the drop down

Advanced Pricing Click if this price update is for a Advanced Pricing and select the pricing method from the drop-down



3. Select the price records to work with based on the Selection Criteria available.
Note: The Selection Criteria fields vary depending on whether a Price Book or Advanced Pricing criteria are selected in the header.

Standard Price Book Criteria

Stock Item / Stock Code Choose one, all or a range - by default all are selected

Analysis Code Choose one, all or a range - by default all are selected

Select by Supplier Tick and then select the supplier. Stock items on which that supplier has been set up, will appear. To include items only where this is the preferred supplier for a stock item, tick the box below the Supplier Name.

Select by Supplier

Code Alpha

Name

Include only where preferred supplier

Margin/ Markup 1 Choose between **Dollar Amount** and **Percentage** as the basis by which the records are selected, enter an operator (greater than, less than) and a value to complete the criteria. This allows the user to achieve a price change on a closely targeted range of stock items.

And/ Or If you want to enter a second “Margin/ Markup criteria” select And – if the items must meet both criteria, Or if the items should match either criteria

Margin/ Markup 2 Choose between **Dollar Amount** and **Percentage** as the basis by which the records are selected, enter the second criteria.

You could get items below a selected margin or above a selected margin using Or. You could get items where the margin is within a range using and.

Cost Updated After Select or Enter a date if you only want items whose cost has been updated since a specified date – e.g. items where the cost has changed in the last 3 months.

Advanced Pricing Additional Criteria

Customer Code Choose one, all or a range - by default all are selected

Sales Rep Choose one, all or a range - by default all are selected

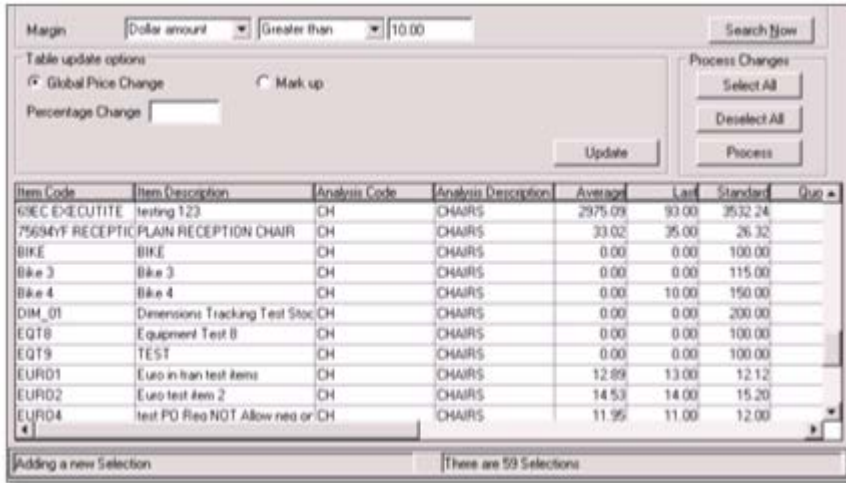
Stock Tree Choose one, all or a range - by default all are selected

Customer Tree Choose one, all or a range - by default all are selected


Margin Select based on a Dollar Amount or Percentage, specify Greater than or Less Than and enter the amount or percentage. E.g.


Margin Percentage Less than 10.01

4. Click the **Search Now** button to show the selected records in the clever table below



Note: Click the **Clear Table** button to remove the selected records from the clever table

Tip: Click the  icon in the header to toggle between part-screen and full-screen views of the clever table

5. Save the pricing update by clicking on the  **Save** icon in the header.

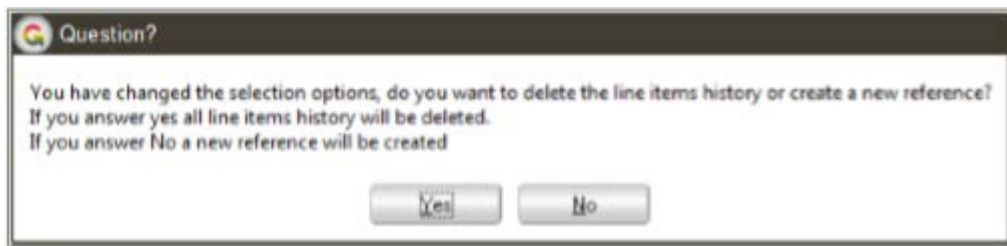
Note: This does not commit the updates to the Live system, it just saves the selected records and any price calculations or manual adjustments you have made to-date.

The Current GP% and Proposed GP% will reflect either Margin or Markup per the IN module control – the display is based on values in the table and does not necessarily agree with what shows in Pricing Maintenance.

Changing the Selection Criteria for a Price Update

You can change the criteria for a Price Update at any point and click the Search Now button to refresh the list of prices in the clever table.


The following warning will appear:

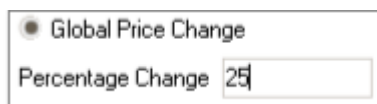


Click **Yes** to remove the price records from the clever table

Click **No** to create a new Price Update, then enter a name for the new Price Update in the **Reference** field.

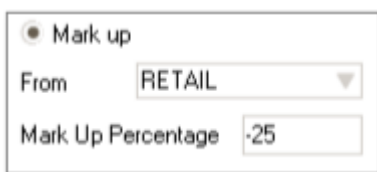
Calculating and Adjusting Prices

1. Click the **Search Now** button to show the selected records in the clever table below
Tip: Click the  icon in the header to toggle between part-screen and full-screen views of the clever table
2. To change the existing prices by a fixed percentage
 - a. Click the **Global Price Change** radio button
 - b. Enter a value in the **Percentage Change** box e.g. 25 (representing 25%)
 - i. Note: positive value will increase prices and a negative value will decrease prices



A screenshot of a form titled "Global Price Change". It features a radio button that is selected, followed by the text "Global Price Change". Below this is a label "Percentage Change" followed by a text input field containing the number "25".

- c. Click the **Update** button
3. To set prices based on a Mark-up from a Standard Price Book
 - a. Click the Mark up radio button
 - b. Choose the Standard Price Book from the drop down
 - c. Enter a value in the **Mark Up Percentage** box e.g. -25 (a mark-down of 25%)
 - i. Note: a positive value will increase prices and a negative value will decrease prices



A screenshot of a form titled "Mark up". It features a radio button that is selected, followed by the text "Mark up". Below this is a label "From" followed by a dropdown menu showing "RETAIL". Below that is a label "Mark Up Percentage" followed by a text input field containing the number "-25".

- d. Click the **Update** button
4. To manually adjust a **proposed price**
 - a. Click in the Proposed Price column for a Stock Item
 - b. Enter a price
 - c. Note how the **Proposed GP %** and **Percentage Change** columns update automatically

Processing Price Changes

Once you are happy with some or all of the Proposed Prices in a Price Update you and are ready to process the changes into your Live Greentree system:

1. To select those price records you want to process, either:
 - a. Click on the **Select All** button

- b. Click the tick box for specific lines in the **Update GT** column of the clever table
 - i. Note: as you select items the number selected is shown in the Process button
- 2. Click the **Process** button



The status of this **Inventory Pricing Workbench** job has now been changed to **Updated** and the date and user for this update captured.

If you do not want to update the prices now, press the **Save** icon. At a later date you can recall this reference and **Process** at that point.

Review Pricing Item History

Double clicking on the **Date last changed** in the row of a stock item will pop up a history of pricing changes which have been done for that item within the Inventory Pricing Workbench. This option will not show prices that have been changed manually through Greentree.

Percentage Change	Date last changed	UOM	Update GT?
3.1500	19 November 2012	EA	<input type="checkbox"/>
0.7500		EA	<input type="checkbox"/>
1.5000		EA	<input type="checkbox"/>
0.7500		EA	<input type="checkbox"/>

Pricing Item History			
Date Changed	User	Previous Price	Changed Price
28 November 2012	SUPER	100.0000	110.0000
28 November 2012	SUPER	110.0000	117.7000

IMPLEMENTATION GUIDE

Please refer to the Important Notes section above before installing and configuring this App

APP INSTALLATION

1. Log into Greentree as the Super user
2. Select the menu item | System | Apps For Greentree | Apps Module Control | 3. Enter the New Registration Codes supplied and click Install App

Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
010025	SO Freight	Functionality to add Freight rule to Sales Orders	<input checked="" type="checkbox"/>	01 November 2017	100-Edit User	Change	
010026	Points	Points Module to add Points for Customer Sales	<input checked="" type="checkbox"/>	31 December 2049	100-Edit User	Change	
010027	SO Generate Invoice Au	Functionality to allow email of invoices from SO Ge	<input checked="" type="checkbox"/>	31 December 2049	100-Edit User	Change	
010029	SO Despatch	Advanced despatch functionality from packing slip	<input checked="" type="checkbox"/>	31 December 2050	0-Edit Users	Change	
010030	AR Credits from CRM Re	Functionality to allow the generation of AR credit n	<input checked="" type="checkbox"/>	31 December 2099	24-Edit Users	Change	

4. Select/Highlight the Inventory Pricing Workbench App.

Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
010012	IN Pricing Workbench	Inventory pricing workbench	<input checked="" type="checkbox"/>	31 December 2049	100-Edit User		

5. Click on the Edit Users button and select the users who will be configured to use Active Directory Integration, for which companies.

User	e-Computers - Australia (0)	e-Computers - Canada (0)	e-Computers - USA (05)	e-Computers - NZ (06)	e-Computers - UK (07)
All Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
001 EDI AK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
001 EDI HN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ADMIN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amanda	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
andrew	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Angela	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Angela Allen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
April Aston	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ashlin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

6. Once you have selected the users, **Save** the settings using the save icon in the header and **Close** the window.
7. **Save** and **Close** the form.

CONFIGURATION

| System | Inventory | Module Control

IN Module Control

Main Defaults Options Serial/Lot Details Labels Inventory Search Variable Weights Auto generate code

Calendar MARCH

Costing

Method Average Cost

Level Location Level

Tax Type Exclusive

Decimal Unit 4 Decimal Places

Allow System Cost Change

Pricing

Level Master Level

Tax Type Exclusive

Decimal Unit 4 Decimal Places

Markup Indicator % Entered and Shown as Mark-Ups Cost Base Average Cost

The Markup Indicator determines whether the selections and display in the pricing workbench show Markup or Margin